

SUBJECT: PeopleSoft Financials Budget Prep Module Available for Processing 2015 Budget and Helpful Reminders

POSTED: February 28, 2014

ANNOUNCEMENT

All Budget Prep users may utilize the Budget Prep module in PeopleSoft Financials for the 2015 Budget. The Budget Prep process remains relatively unchanged from last year. Therefore, ITS will not hold live Budget Prep training this year. However, an updated Budget Prep User Guide will be distributed via a listserv announcement and available on the GeorgiaFIRST website by Wednesday, March 5, 2014.

Below is a list of reminders and helpful hints for Budget Prep for the FY 2015 Budget Prep Cycle.

Budget Prep Setup Reminders:

- Pay Group Account – review to verify target Pay Groups are shown
- Year/Hours Parameters
 - From Budget Period: 2014
 - To Budget Period: 2015
 - To Budget Period Hrs: 2088
 - Max Raise Rate: User defined
- Pay Group Raise Effective Dates: User defined
 - Fringe Accounts (FICA, ...)
 - FICA: verify 6.20% for FICA eligible accounts
 - Retirement:
 - ERS - “Old” Plan 17.21%
 - ERS - “New” Plan 21.96%
 - TRS – 13.15%
 - ORP – 9.24% (no change)
 - Group Health: User defined based on Benefit Plan
 - No new system wide Health Plans
 - Verify health plan calculations

Budget Prep Extract/Load Reminders:

- Using the “Only Budgeted Positions” checkbox in EV5 will exclude non budgeted and inactive positions from the EPOH009 Budget Extract File.
- Positions containing “9999999” in the department field will not be loaded into the Budget Prep module. Corrections should be made in EV5 prior to running the extraction process (EPOH009).

Recent Release Items:

- Schedule E-1 has been modified to include fund 12220.
- Export HR/Payroll has been modified to delete the “4” in the department which prohibited the “D” records from being produced on the .pdf reports in the process monitor.

MORE INFORMATION AND SUPPORT

For business impact emergency issues, contact the ITS Helpdesk immediately at 706-583-2001 or 1-888-875-3697 (toll free within Georgia). For non-urgent issues, contact the ITS Helpdesk via the self-service support website at http://www.usg.edu/customer_services. (This service requires a user ID and password. E-mail helpdesk@usg.edu to obtain self-service login credentials.)

ADDITIONAL RESOURCES

For information about ITS maintenance schedules or Service Level Guidelines, please visit http://www.usg.edu/customer_services/service_level_guidelines. For USG services status, please visit <http://status.usg.edu>.